

MVR Procedure 2.2 General Purchasing and Property Management Instructions and Requirements 2 1 07

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This procedure is supported by the delegated authority given to the Division by the Public Health and Human Services purchasing agreement with the Department of Administration

Delegated Authority to Purchase

MVR counselors have the authority to purchase necessary case goods and services. The MVR Authorization purchases all consumer goods and services. Certain durable goods exceed the cost authority of the Division and those goods must be purchased through the authority of DPHHS Purchasing. MVR counselors have the authority to purchase durable goods up to \$3,499 based on case file documented rehabilitation need, consumer choice of vendors and counselor consensus regarding suitability of the goods being purchased

MVR Procedure for Bidding

The MVR counselor will conduct a minimum of three bids (telephone acceptable) for purchases of goods ranging from \$3,500 to \$14,999. The case file shall contain the following evidence of the bid for a minimum of three vendors:

- a. The name and telephone number of the contact person;
- b. The bid price, with shipping and handling if applicable;
- c. Delivery date after receipt of order; and
- d. Brand, model, color and any special instructions or conditions.

The purchase must be awarded to the lowest bidder. The successful bidder must present to the counselor a written bid, which includes a description of any special conditions or needs.

For any purchase to an individual vendor \$15,000 or over, the counselor must route the purchase through the DPHHS purchasing office utilizing the ADM-002 in addition to the authorization. The counselor may submit a request for a preferred vendor. Documentation to support the vendor is the same documentation required in the above referenced "Documentation Requirements."

MVR Procedure Regarding Sole Source Justification

A counselor will encounter special circumstance, which may require a modification of the purchasing process. Those circumstances are: the need for sole-source purchases, and emergency purchases.

Sole-source justifications are to be written by the counselor and stored in the case file. A sole-source justification describes the rehabilitation needs, which require MVR deal with a specific vendor even when the cost may be more. The significant private financial participation of the consumer in the purchase of a good may suffice to establish a sole-source relationship with a vendor. The financial advantage of purchasing used equipment may also suffice as a sole-source justification. The Regional Administrator as well as the counselor prior to the purchase must sign the case entry entitled "Sole-source Justification". For purchases over \$15,000, the sole-source justification case entry must be copied and sent along with the ADM-002 to DPHHS purchasing. Emergency justifications for sole source purchasing are limited to circumstances where the bidding process would substantially threaten the successful outcome of the rehabilitation program.

MVR Procedure Regarding Term Contracts

Term contracts are contracts established by the Department of Administration Property and Supply Division for a predetermined price for contract price. The MVR counselor must purchase from the exclusive term contracts unless a sole-source justification overrides this requirement. The file justification must be submitted to the DPHHS Purchasing Office for approval prior to purchasing outside the term contract. All term contract purchases regardless of price must be routed through DPHHS Purchasing for updated pricing.

MVR Procedure Regarding Loan Agreement/Transfer of Ownership

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The counselor will enter into a signed Loan Agreement/Transfer of Ownership arrangement ([Loan Agreement Form](#)) when purchasing durable goods for a consumer that cost more than \$500. The counselor will transfer the ownership of the goods when the counselor determines the goods will be suitable and used for the purposes of the Plan goal. The counselor may assign ownership if the good is used to overcome an impediment to independent living. The counselor may retain ownership for goods costing less than \$500 when the counselor determines the goods may have significant value to another consumer if returned. This policy does not apply to durable goods in which the consumer has significant cost participation either in direct payment or through secondary costs such as motor vehicle insurance. The MVR Regional/Program Administer may adapt this procedure for an individual consumer to allow the authorization of the direct assignment of durable goods valued over \$500, if the Regional/ Program Administrator determines direct assignment best serves the consumer and agency in meeting rehabilitation need.

The counselor must register all goods purchased through the Loan Agreement/Transfer of Ownership process as an agency comparable benefit in the MVR Comparable Benefits Inventory. MVR Property managers will use the following criteria to determine if they must maintain an inventory on durable goods purchased with MVR benefit funds and loaned to clients for possible assignment. The following loaned durable goods must be entered into the inventory:

1. All durable goods valued over \$500;
2. All Computer Processing Units under four years old that have retained their value;
3. Any computer peripheral valued over \$500 and adaptive technology valued over the price of \$250;
4. Other equipment specifically determined by the agency to have value as a loan item regardless of cost.

MVR staff will directly grant to the client all equipment that does not meet the above criteria for value. All other monitors, speakers, key boards, and do not meet the criteria of 1-4 are not to be entered into the CBI inventory.

Technology Considerations:

Software purchases other than basic operating systems will be made in the client's name unless the counselor and Regional Administrator determine the software has long term value in the CBI inventory.

The MVR CBI Loaner Computer Check-out Protocol:

If the computer is property of MVR, prior to physically loaning (handing over) the CPU, MVR property manager will assure:

1. The software on the computer is inventoried to verify the agency or client has a license for all the software on the machine. No computer may be loaned containing software for which MVR or the client cannot demonstrate ownership.
2. The computer has current virus protection. A computer may not be loaned for a period that exceeds the virus protection. Typically this will require minimally an annual review of loaned equipment to update protection.

The MVR CBI Loaner Computer Check-in Protocol:

If the computer is property of MVR when the computer is physically received by MVR:

1. The previous users' profile and all user information shall be deleted from the computer. All software on the computer not licensed to MVR, or for which we cannot demonstrate a license, must be uninstalled.
2. If the computer is checked in without current virus protection, the computer must be scanned for viruses prior to reusing.

The MVR CBI Loaner Computer Disposal Procedure:

When disposing of computer processing units that have lost their value, the MVR property manager is to arrange to have the hard drive removed from the unit and shipped to Central Office for disposal. A CPU used in the MVR CBI Loaner program may not be disposed locally with the hard drive(s) intact.

MVR Documentation Requirements Regarding Ongoing IPE Purchasing

a. The MVR case record will reflect that a minimum of three bids (telephone acceptable) for purchases of goods ranging from \$3,500 to \$14,999. The case file shall contain the following evidence of the bid for a minimum of three vendors:

- i. The name and telephone number of the contact person;
- ii. The bid price, with shipping and handling if applicable;
- iii. Delivery date after receipt of order; and
- iv. Brand, model, color and any special instructions or conditions

b. The MVR case file will contain the winning bid along with any conditions of purchase agreed to with the vendor.

c. The MVR case record will reflect MVR counselor approval of goods and services received for payment.

d. The MVR case file will contain the Loan/Agreement transfer of ownership documentation for any good purchased or loan service provided through the agency.

e. The MVR case record will contain headlined case entries justifying sole source purchases with counselor and Regional Administrator signatures.